Oracle Banking Digital Experience

Dashboard Widgets - Customer Services
Release 15.1.0.0.0

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ORACLE®

Dashboard Widgets Customer Service User Manual

October 2015

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1. Preface

1.1 Intended Audience

This document is intended for the following audience:

- Customers
- Partners

1.2 Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

1.3 Access to OFSS Support

https://support.us.oracle.com

1.4 Structure

This manual is organized into the following categories:

Preface gives information on the intended audience. It also describes the overall structure of the User Manual.

Transaction Host Integration Matrix provides information on host integration requirements for the transactions covered in the User Manual.

Introduction provides brief information on the dashboard widgets in the application.

The subsequent chapters provide information on widgets covered in the User Manual.

Each transaction is explained in the following manner:

- Introduction to the widget
- Screenshots of the widget

  The images of screens used in this user manual are for illustrative purpose only, to provide improved understanding of the functionality; actual screens that appear in the application may vary based on selected browser, theme, and mobile devices.
- Procedure containing steps to view or use the widget- The mandatory and conditional fields for the widget are explained in the procedure.

1.5 Related Information Sources

For more information on Oracle Banking Digital Experience Release 15.1.0.0.0, refer to the following documents:

- Oracle Banking Digital Experience Licensing Guide
- Oracle Banking Digital Experience Installation Manuals

2. Transaction Host Integration Matrix

Legends

NH	No Host Interface Required.
★	Host Interface to be developed separately.
✓	Pre integrated Host interface available.
✕	Pre integrated Host interface not available.

Transaction Name	FLEXCUBE UBS	Third Party Host System
Recent Transactions	NH	NH
My Transactions	NH	NH
Pending For Authorization	NH	NH
Mails	NH	NH
Last 10 Used Cheques	✓	★
Session Summary	NH	NH
Logged In Users	NH	NH
RSS Feeds	NH	NH
Blackout – Next 7 Days	NH	NH
Notification	NH	NH
Quick Tasks	NH	NH
Tools	NH	NH
Request Status	NH	NH
Foreign Exchange Deals	NH	NH

3. Introduction - Dashboard Widgets

Widgets are smaller applications within an application that display data in an optimized form.

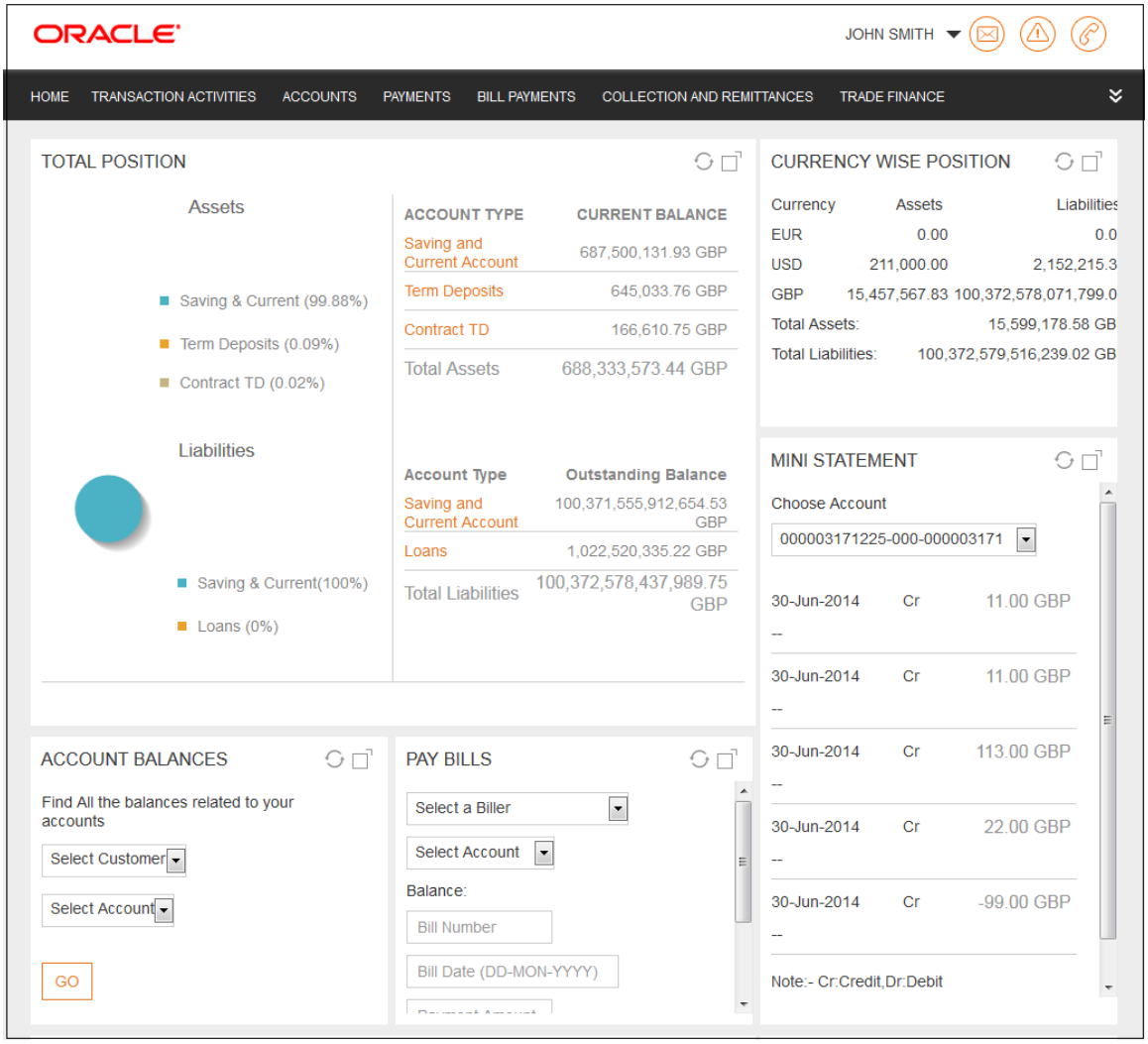
You can add widgets related to main transactions on the dashboard of the application. The widgets display important and minimal information about the transactions. You can also initiate the transactions from the related widgets.

The widgets displayed in the application depend on whether you have access to the transaction related to the widget, your user type in the application, and configurations setup by the bank.

You can select, replace, or remove widgets displayed on the dashboard using the **Dashboard Widget Management** transaction.

Note: For more information about **Dashboard Widget Management** transaction, see *Customer Services User Manual*.

Dashboard


ORACLE
JOHN SMITH
HOME
TRANSACTION ACTIVITIES
ACCOUNTS
PAYMENTS
BILL PAYMENTS
COLLECTION AND REMITTANCES
TRADE FINANCE
TOTAL POSITION
Assets
Saving & Current (99.88%)
Term Deposits (0.09%)
Contract TD (0.02%)
Liabilities
Saving & Current(100%)
Loans (0%)
ACCOUNT TYPE
CURRENT BALANCE
Saving and Current Account
687,500,131.93 GBP
Term Deposits
645,033.76 GBP
Contract TD
166,610.75 GBP
Total Assets
688,333,573.44 GBP
Account Type
Outstanding Balance
Saving and Current Account
100,371,555,912,654.53 GBP
Loans
1,022,520,335.22 GBP
Total Liabilities
100,372,578,437,989.75 GBP
CURRENCY WISE POSITION
Currency
Assets
Liabilities
EUR
0.00
0.0
USD
211,000.00
2,152,215.3
GBP
15,457,567.83
100,372,578,071,799.0
Total Assets:
15,599,178.58 GB
Total Liabilities:
100,372,579,516,239.02 GB
MINI STATEMENT
Choose Account
000003171225-000-000003171
30-Jun-2014 Cr 11.00 GBP
30-Jun-2014 Cr 11.00 GBP
30-Jun-2014 Cr 113.00 GBP
30-Jun-2014 Cr 22.00 GBP
30-Jun-2014 Cr -99.00 GBP
Note:- Cr:Credit,Dr:Debit
ACCOUNT BALANCES
Find All the balances related to your accounts
Select Customer
Select Account
GO
PAY BILLS
Select a Biller
Select Account
Balance:
Bill Number
Bill Date (DD-MON-YYYY)

4. Recent Activity

This widget displays the last 5 performed transactions in a minimalistic form.

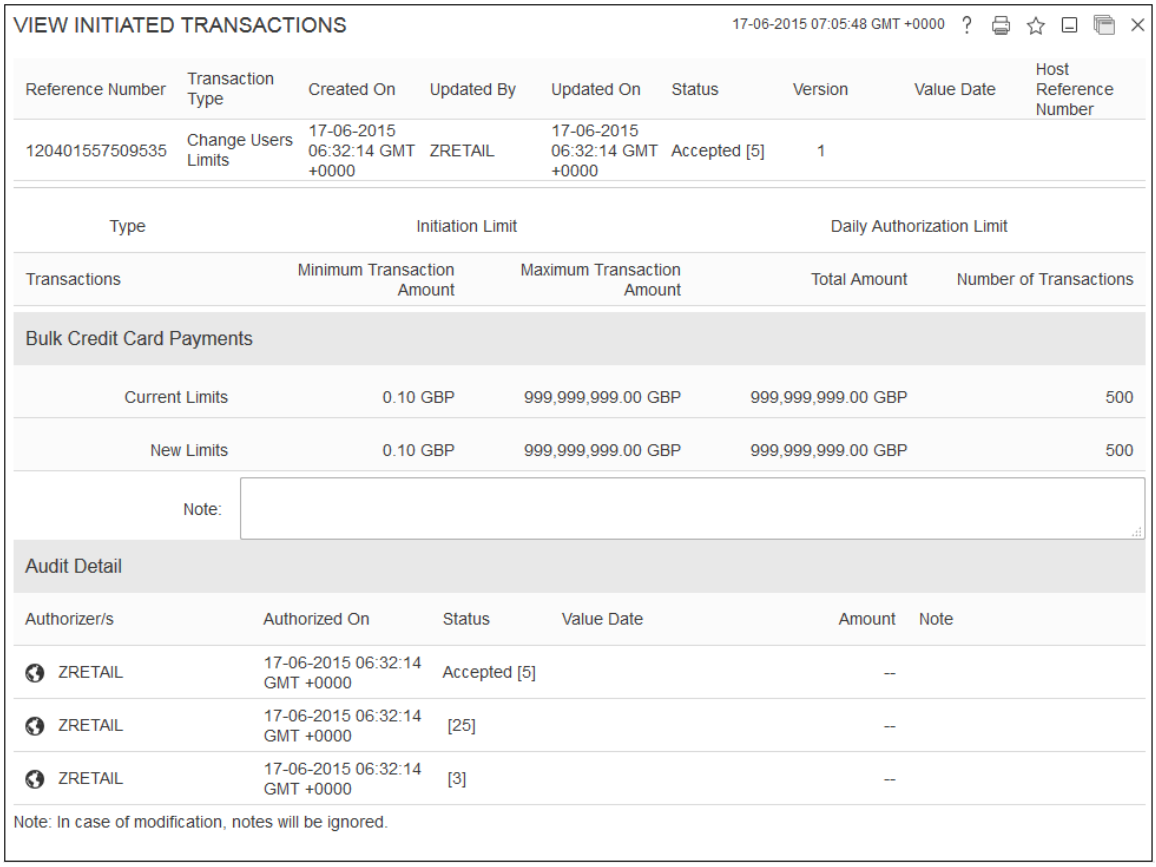
Widget – Recent Transactions

The last 5 transactions along with their initiation or last updating date are displayed in the *Recent Transactions* widget as shown above.

To view transactions

1. Click the link to view the transactions.
   The details of the required transaction in the **View Transactions** screen appears.

View Initiated Transactions



VIEW INITIATED TRANSACTIONS

17-06-2015 07:05:48 GMT +0000

Reference Number	Transaction Type	Created On	Updated By	Updated On	Status	Version	Value Date	Host Reference Number
120401557509535	Change Users Limits	17-06-2015 06:32:14 GMT +0000	ZRETAIL	17-06-2015 06:32:14 GMT +0000	Accepted [5]	1		

Type	Initiation Limit		Daily Authorization Limit	
Transactions	Minimum Transaction Amount	Maximum Transaction Amount	Total Amount	Number of Transactions
Bulk Credit Card Payments				
Current Limits	0.10 GBP	999,999,999.00 GBP	999,999,999.00 GBP	500
New Limits	0.10 GBP	999,999,999.00 GBP	999,999,999.00 GBP	500

Note:

Audit Detail

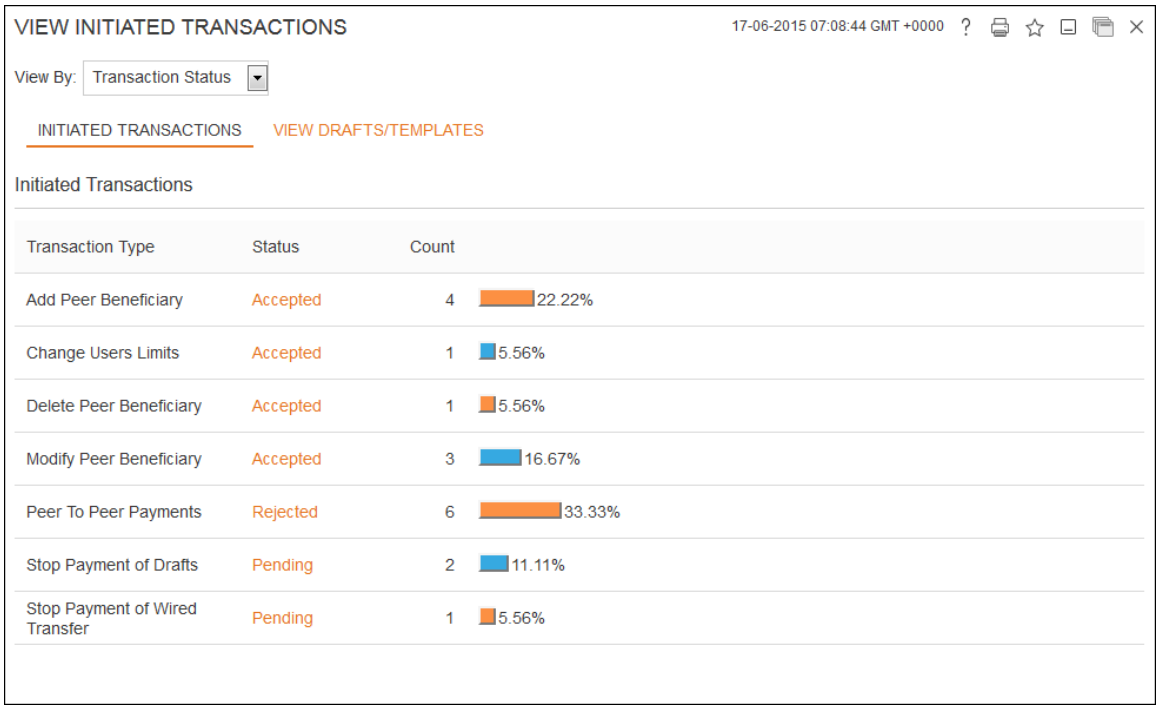
Authorizer/s	Authorized On	Status	Value Date	Amount	Note
ZRETAIL	17-06-2015 06:32:14 GMT +0000	Accepted [5]		--	
ZRETAIL	17-06-2015 06:32:14 GMT +0000	[25]		--	
ZRETAIL	17-06-2015 06:32:14 GMT +0000	[3]		--	

Note: In case of modification, notes will be ignored.

2. Click to refresh the data in the widget.

3. Click.
The **View Initiated Transactions** screen appears.

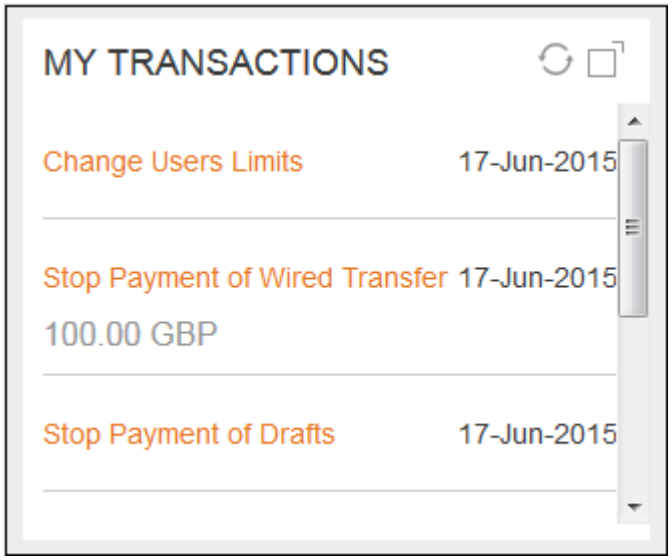
View Initiated Transactions



5. My Transactions

This widget displays the last 5 initiated transactions in a minimalistic form.

Widget – My Transactions

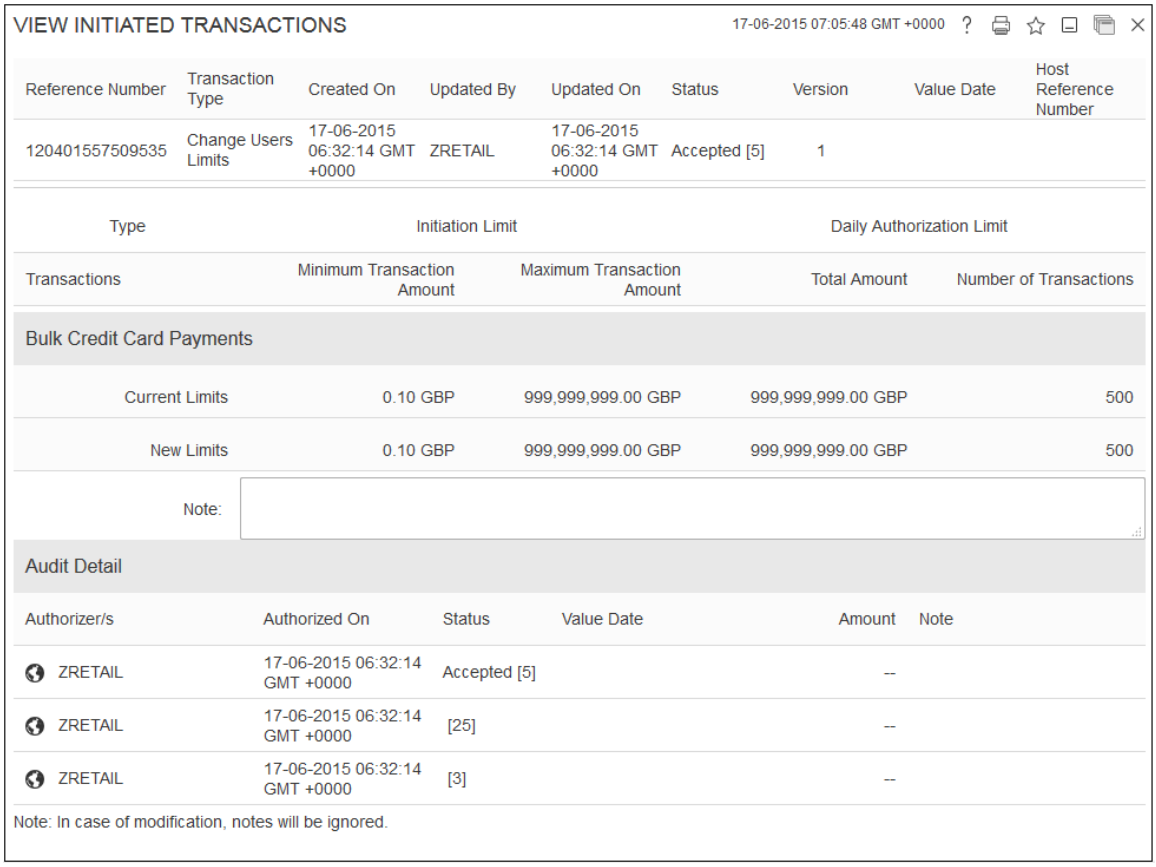


Last 5 transactions along with their initiation or last updating date are displayed in My Transactions widget as shown above.

To view last few initiated transactions

1. Click any of the displayed transactions.
   The **View Initiated Transactions** screen appears with details of the selected transaction.

View Initiated Transactions



VIEW INITIATED TRANSACTIONS

17-06-2015 07:05:48 GMT +0000

Reference Number	Transaction Type	Created On	Updated By	Updated On	Status	Version	Value Date	Host Reference Number
120401557509535	Change Users Limits	17-06-2015 06:32:14 GMT +0000	ZRETAIL	17-06-2015 06:32:14 GMT +0000	Accepted [5]	1		

Type	Initiation Limit		Daily Authorization Limit	
Transactions	Minimum Transaction Amount	Maximum Transaction Amount	Total Amount	Number of Transactions
Bulk Credit Card Payments				
Current Limits	0.10 GBP	999,999,999.00 GBP	999,999,999.00 GBP	500
New Limits	0.10 GBP	999,999,999.00 GBP	999,999,999.00 GBP	500

Note:

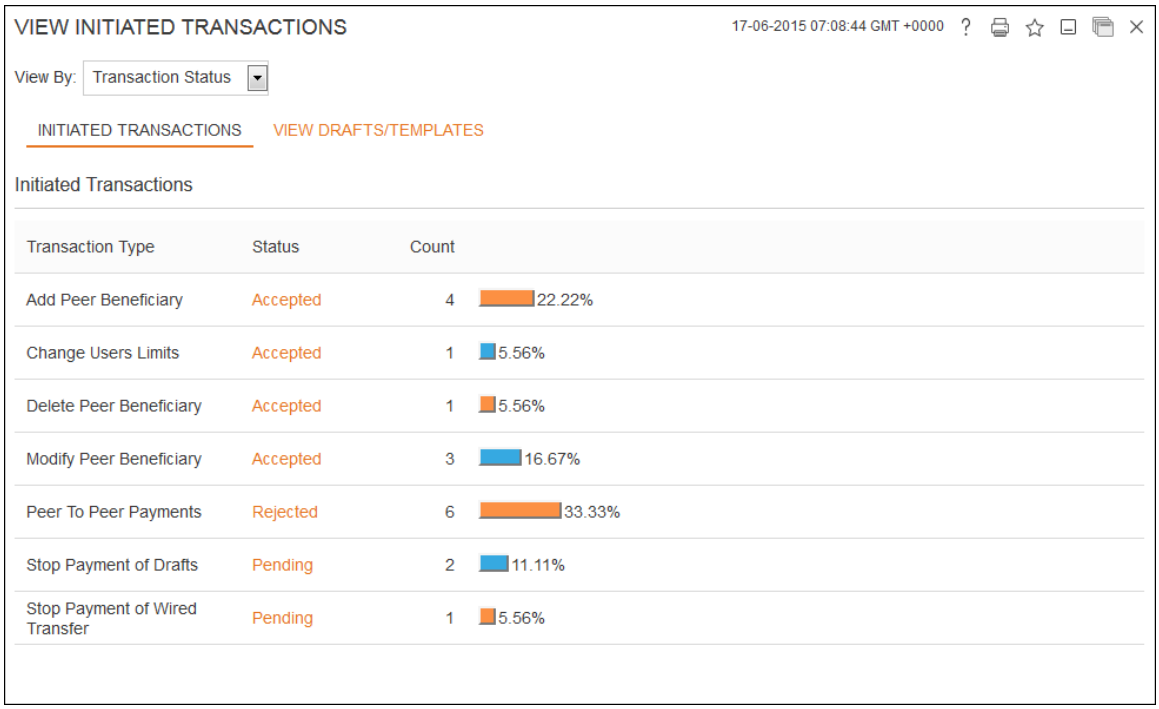
Audit Detail

Authorizer/s	Authorized On	Status	Value Date	Amount	Note
ZRETAIL	17-06-2015 06:32:14 GMT +0000	Accepted [5]		--	
ZRETAIL	17-06-2015 06:32:14 GMT +0000	[25]		--	
ZRETAIL	17-06-2015 06:32:14 GMT +0000	[3]		--	

Note: In case of modification, notes will be ignored.

2. Click .
The **View Initiated Transactions** screen appears.

View Initiated Transactions

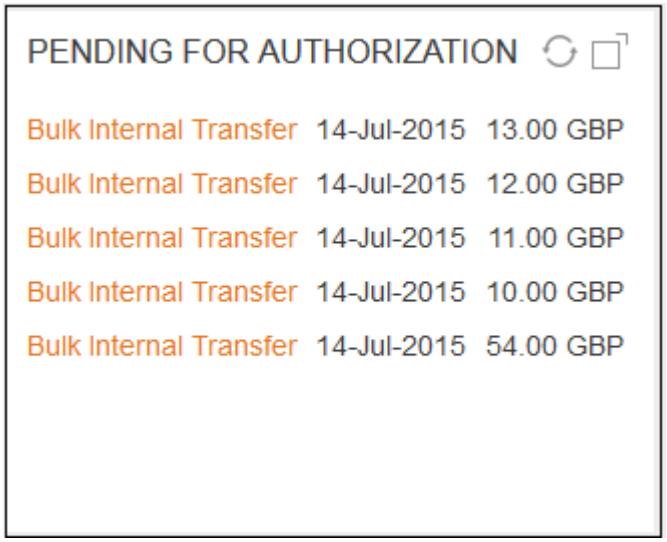


3. Click in the widget to refresh.

6. Pending For Authorization

This widget displays the last few (as configured in the system) transactions waiting for user's approval/authorization.

Widget – Pending for Authorization

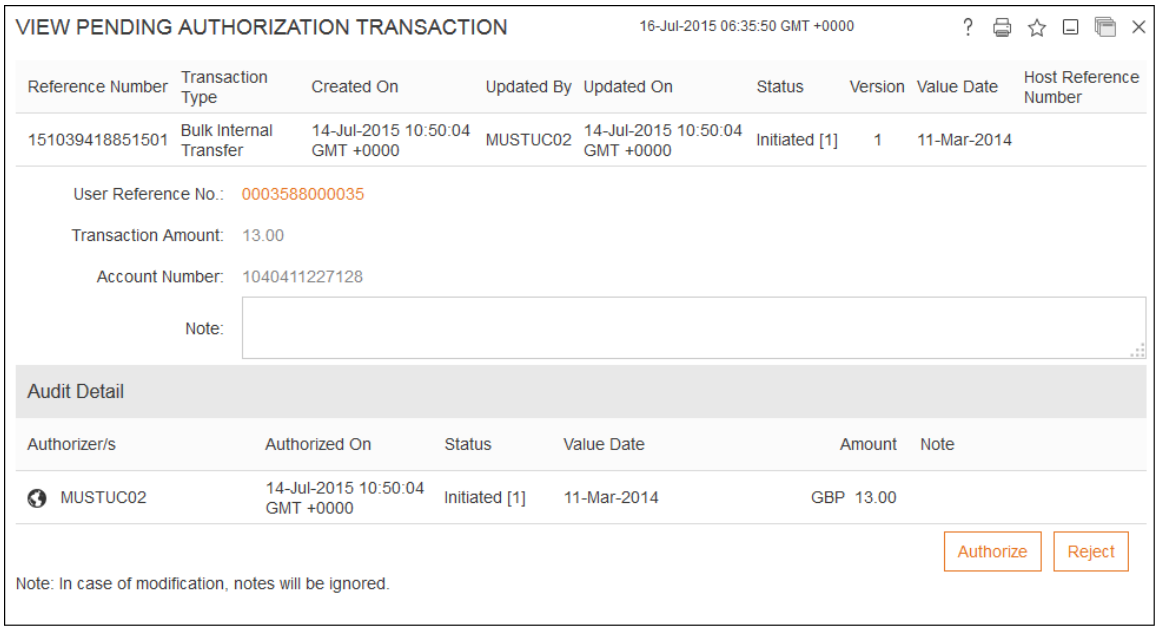

PENDING FOR AUTHORIZATION
Bulk Internal Transfer 14-Jul-2015 13.00 GBP
Bulk Internal Transfer 14-Jul-2015 12.00 GBP
Bulk Internal Transfer 14-Jul-2015 11.00 GBP
Bulk Internal Transfer 14-Jul-2015 10.00 GBP
Bulk Internal Transfer 14-Jul-2015 54.00 GBP

Last 'n' transactions along with their initiation or last updating date and transaction amount are displayed in Pending for Authorization widget as shown above.

To view transactions pending for authorization

1. Click any of the displayed transactions.
   The **View Pending Authorization Transactions** screen appears.

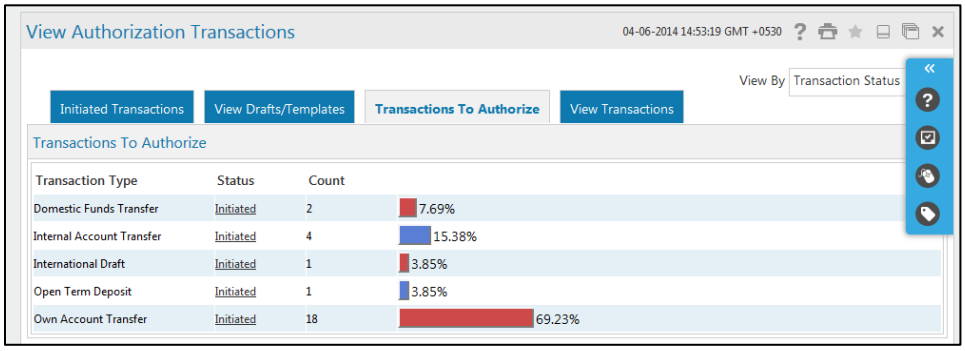
View Pending Authorization Transaction



2. Click in the widget to refresh.

3. Click icon in the widget.
The **View Authorization Transactions** screen appears.

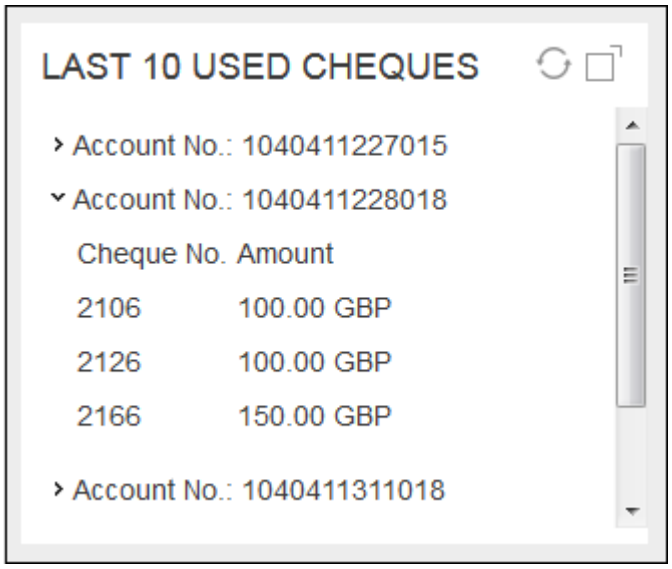
View Authorization Transactions



7. Last 10 Used Cheques

This widget displays the cheque status inquiry in a minimalistic form. It will display last 10 cheques marked as used across all your accounts.

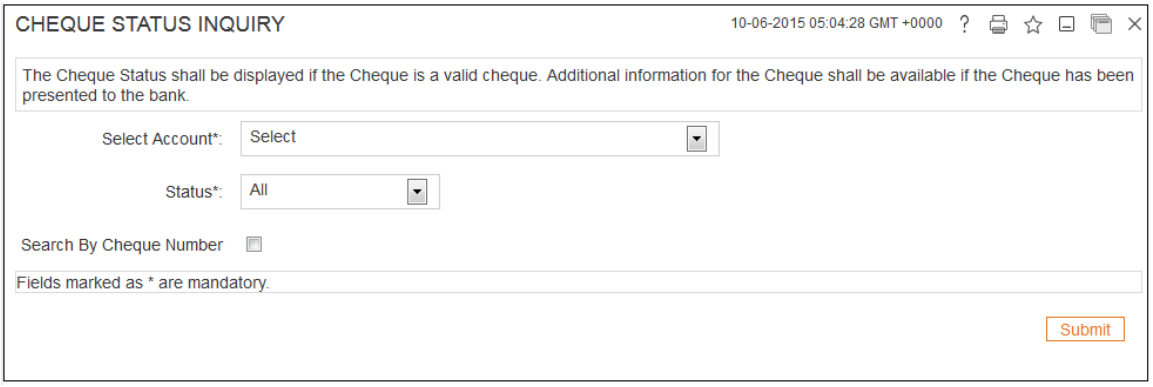
Widget – Last 10 Used Cheques



To view cheque status

1. Click next to the required account number.
   The used cheque numbers of the selected account appear with the cheque amount and currency.
2. Click to hide the used cheque details of the selected account.
3. Click to refresh the data in the widget.
   OR
   Click.
   The **Cheque Status Inquiry** screen appears.

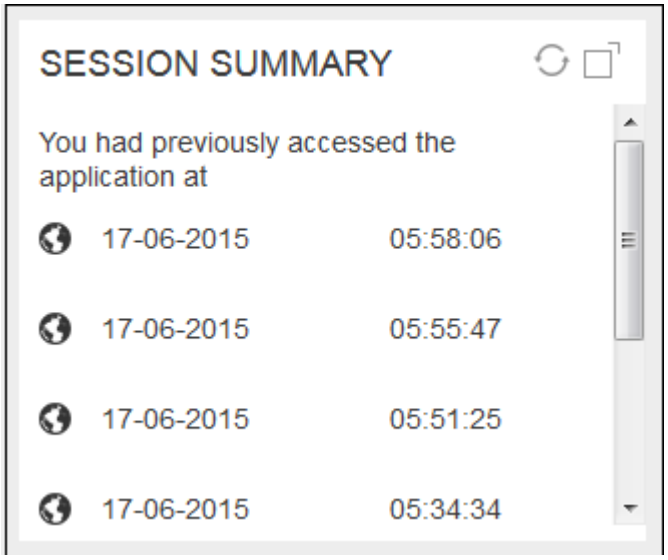
Cheque Status Inquiry


CHEQUE STATUS INQUIRY
10-06-2015 05:04:28 GMT +0000
The Cheque Status shall be displayed if the Cheque is a valid cheque. Additional information for the Cheque shall be available if the Cheque has been presented to the bank.
Select Account*:
Select
Status*:
All
Search By Cheque Number
Fields marked as * are mandatory.
Submit

8. Session Summary

This widget displays the session summary in a minimalistic form. This widget displays last 5 login session dates and time when session was started. Session summary will be displayed using preferred time zone of the user.

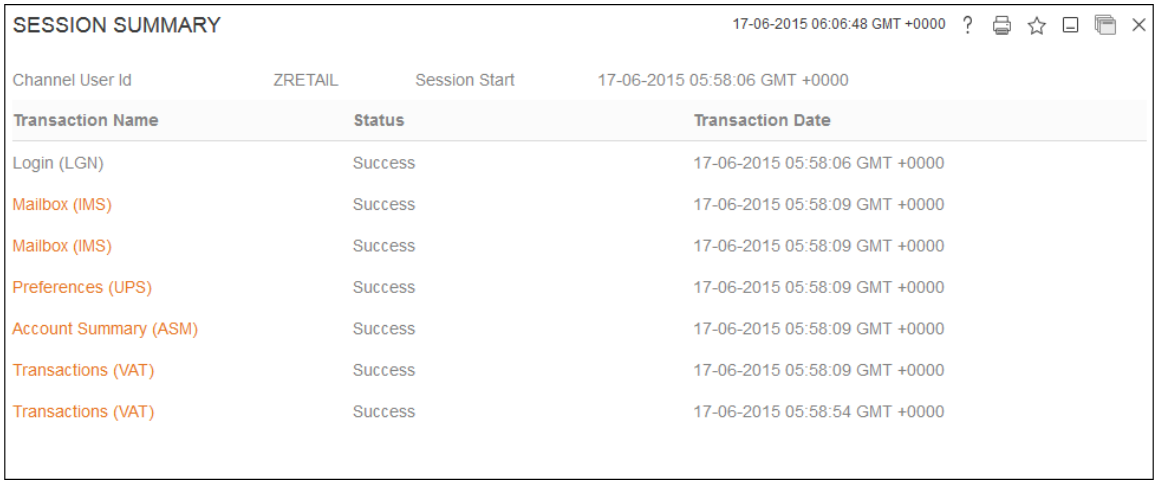
Widget – Session Summary



To view session summary

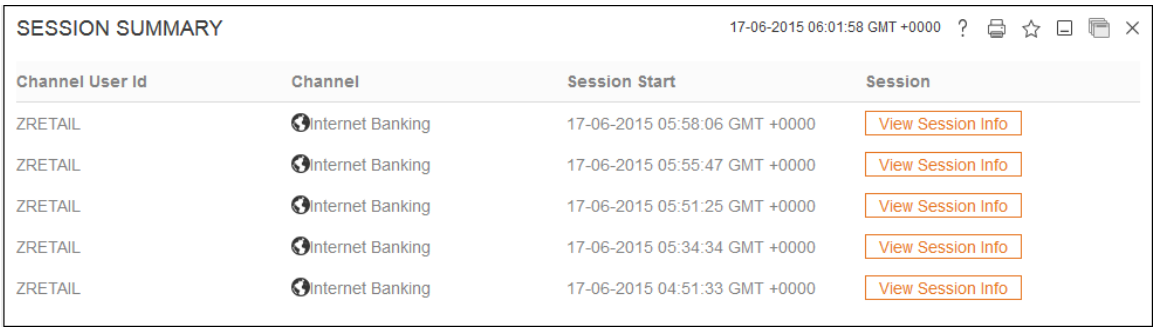
1. Click adjacent to the login details.
The **Session Summary** screen along with the session information of the selected login appears.

Session Summary


SESSION SUMMARY
17-06-2015 06:06:48 GMT +0000
Channel User Id ZRETAIL Session Start 17-06-2015 05:58:06 GMT +0000
Transaction Name Status Transaction Date
Login (LGN) Success 17-06-2015 05:58:06 GMT +0000
Mailbox (IMS) Success 17-06-2015 05:58:09 GMT +0000
Mailbox (IMS) Success 17-06-2015 05:58:09 GMT +0000
Preferences (UPS) Success 17-06-2015 05:58:09 GMT +0000
Account Summary (ASM) Success 17-06-2015 05:58:09 GMT +0000
Transactions (VAT) Success 17-06-2015 05:58:09 GMT +0000
Transactions (VAT) Success 17-06-2015 05:58:54 GMT +0000

2. Click to refresh the data in the widget.
OR
Click in the widget.
The **Session Summary** screen appears.

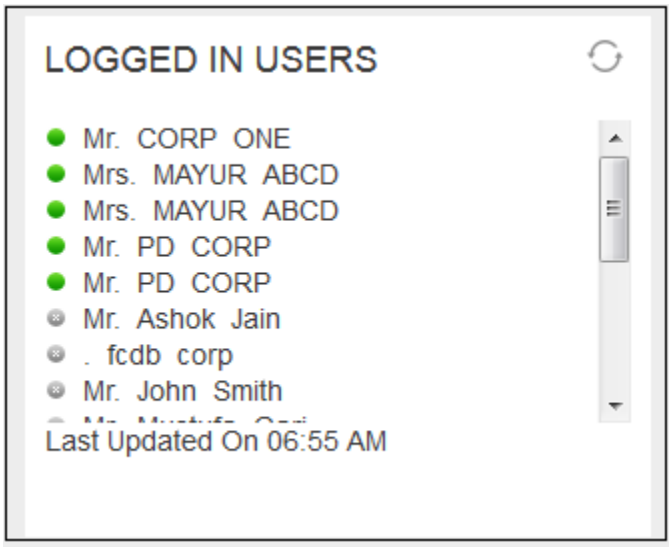
Session Summary



9. Logged In Users

This widget displays the list of other users having the same customer id. It also displays the logged in status of those users. The widget displays green icon for logged in user and grey icon for offline users. User name with their user id is also displayed as shown in the above screen.

Widget – Logged In Users



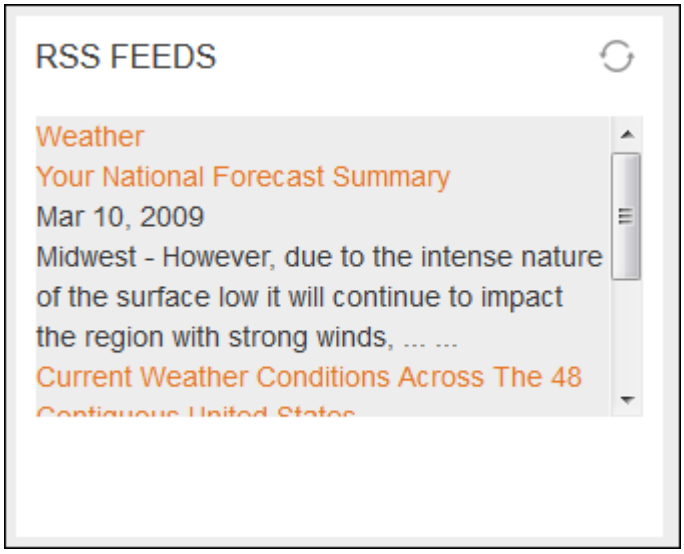
To view the list of logged in users

1. Click to refresh the data in the widget.

10. RSS Feeds

This widget displays the integrated RSS Feeds. RSS (Real Simple Syndication) is a relatively new and easy way to distribute content via the internet. This widget mainly displays frequently updated works such as blog entries, news headlines, weather forecast etc in a standardized format.

Widget – RSS Feeds


RSS FEEDS
Weather
Your National Forecast Summary
Mar 10, 2009
Midwest - However, due to the intense nature of the surface low it will continue to impact the region with strong winds, ...
Current Weather Conditions Across The 48

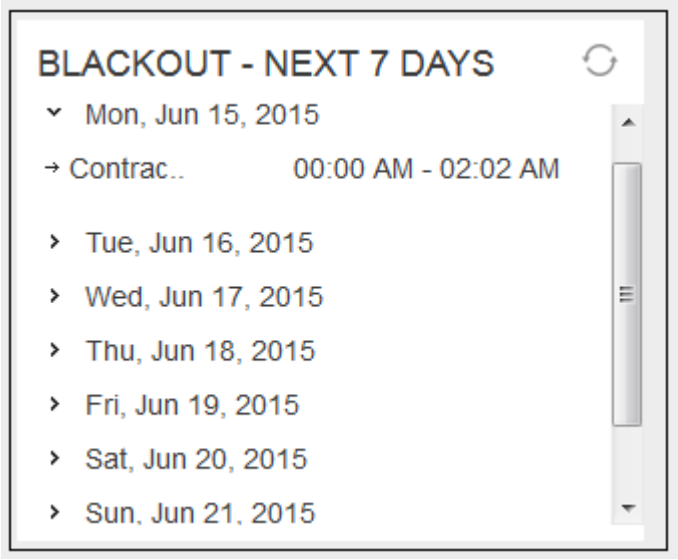
To view real simple syndication feeds

1. Click any of the links.
   The RSS feeds appear in new window.
2. Click in the widget to refresh.

11. Blackout – Next 7 Days

This widget displays blackouts planned for next 7 days. You will not able to access that transaction for the specified blackout period.

Widget – Blackout – Next 7 Days



To view the blackout planned for next few days

1. Click to view the transaction name for which the blackout has been set and also the time period of the blackout appears.
2. Click to hide the transaction name for which the blackout has been set and also the time period of the blackout.
3. Click to refresh the data in the widget.

12. Notifications

This group of widgets displays notifications that are generated for the user. These widgets are present at the top right corner of the dashboard.

The widgets for notifications include:

- Inbox: This widget displays Mails and Bulletins
- Alerts: This widget displays Alerts & Tasks

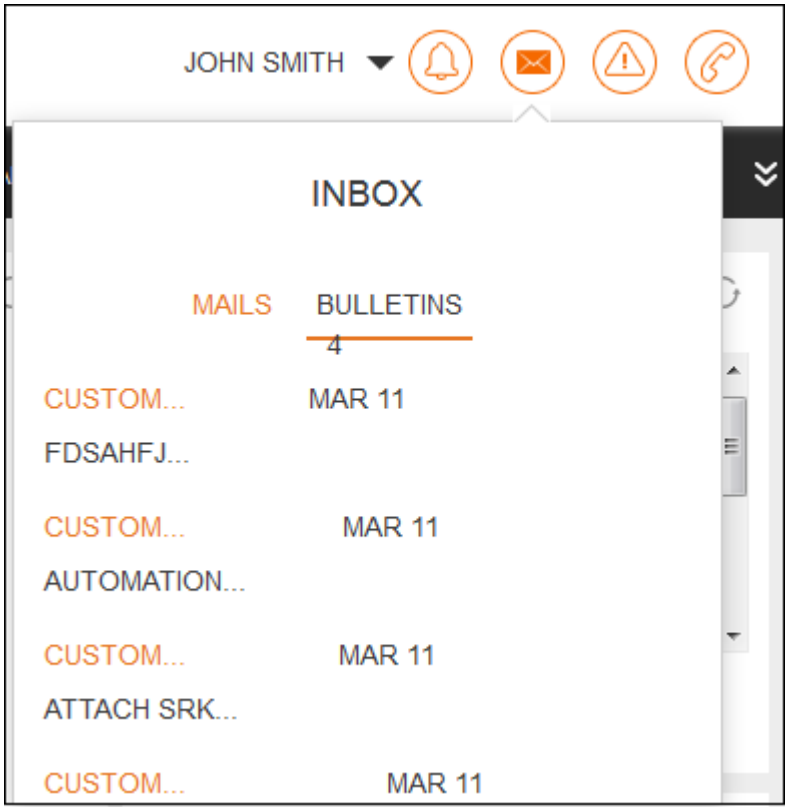
There are links provided on the subject/title of each Alert, Message and Bulletin. On clicking on a link, the mailbox will be displayed with details of that alert, message or bulletin.

Widget – Inbox

To view mail notifications

1. Click **Mails** to view the unread mails.
   OR
   Click **Bulletins** to view the unread bulletins.

Inbox



2. Click any unread mail or bulletin in the Inbox widget.
   The mail or bulletin in **Mailbox** screen appears.

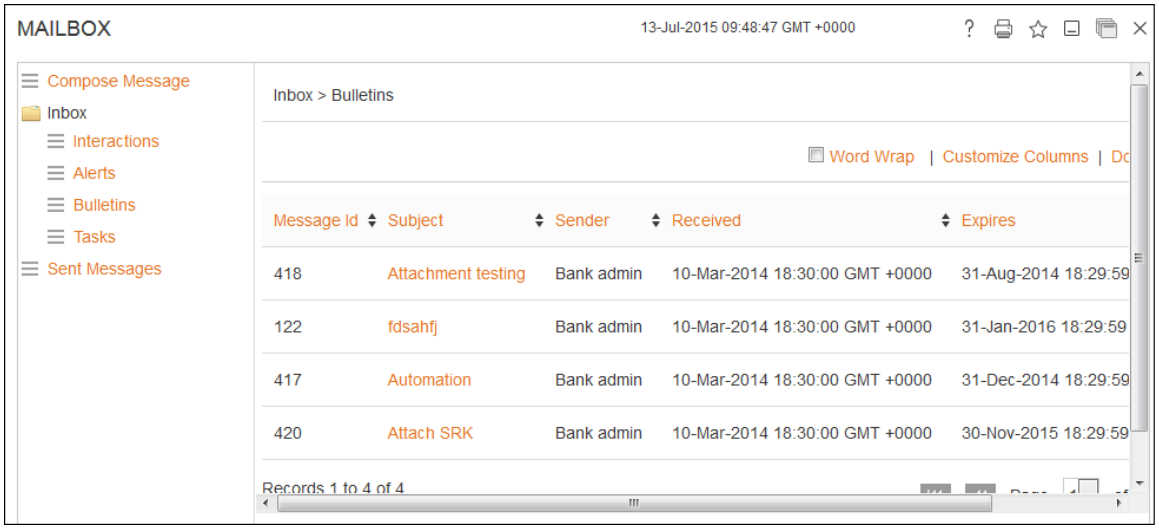
Widget – Alerts

To view alert notifications

3. Click **Alerts** to view the unread alerts.
   OR
   Click **Tasks** to view the unread tasks.

4. Click any unread alert or task in the **Alerts** widget.
   The alert or task in **Mailbox** screen appears.

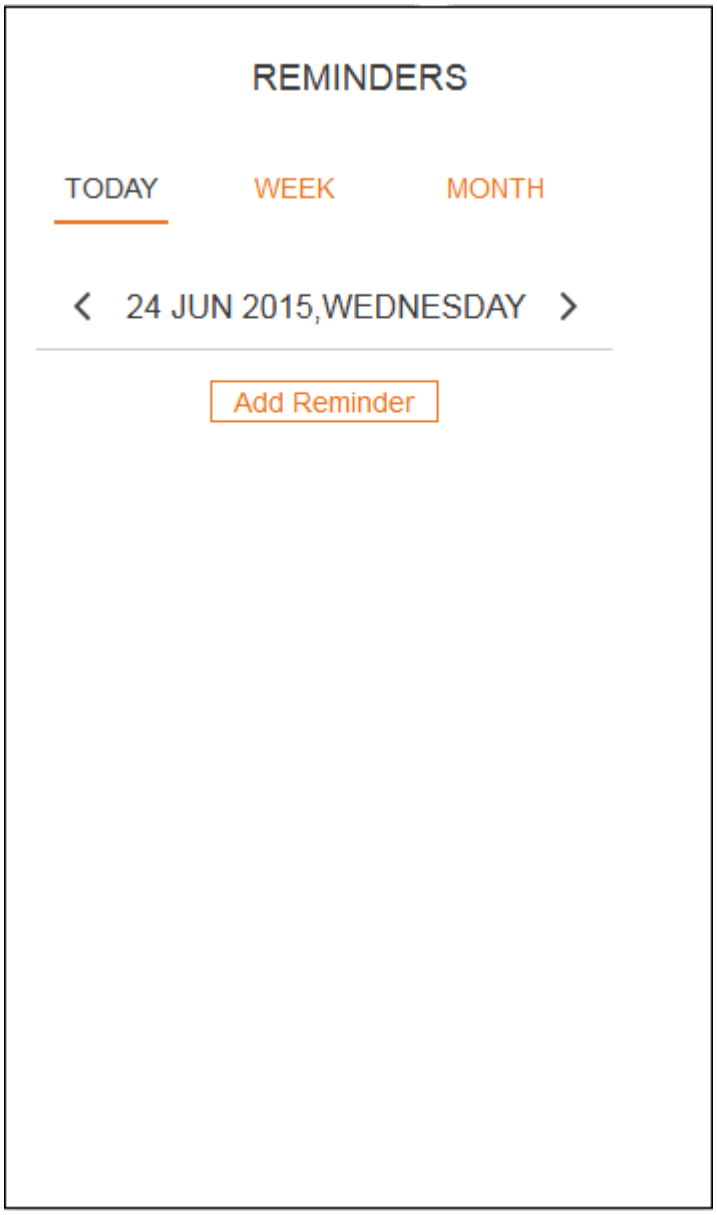
Mailbox



13. Reminders

This widget displays any reminders that you have created in the system for the current day, or for upcoming weeks or months. This widget is present at the top right corner of the dashboard.

Widget- Reminders



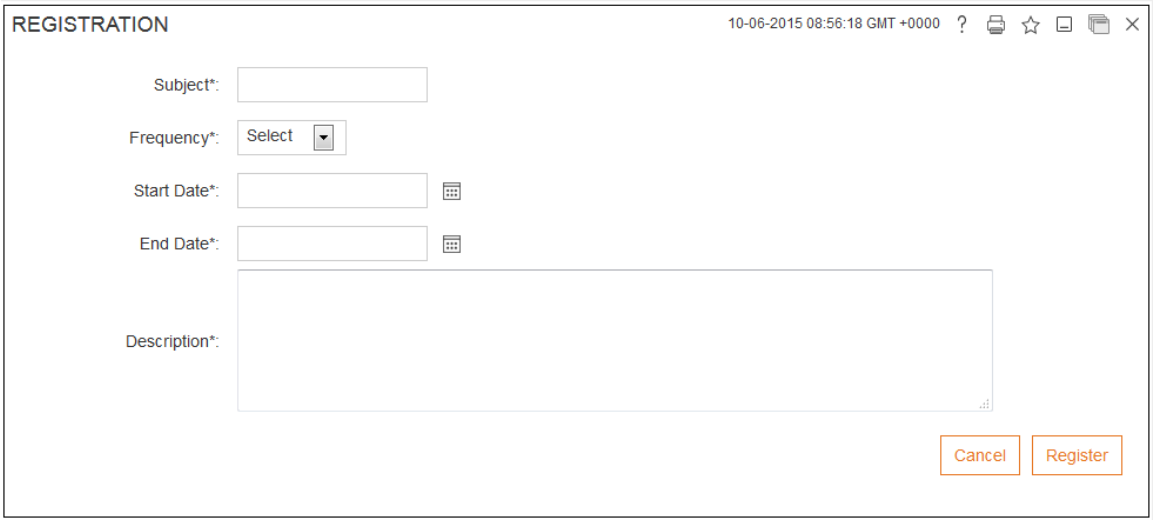
To view the reminders

1. Click **Today** to view the unread reminders for the current day.
   OR
   Click **Week** to view the unread reminders for the current week.

OR
Click **Month** to view the unread reminders for the current month.

2. Click **Dismiss** to close a read reminder and then click **OK**.
3. Click **Add Reminder** to add a reminder from the widget.
The **Registration** screen to register for new reminders appears.

Registration

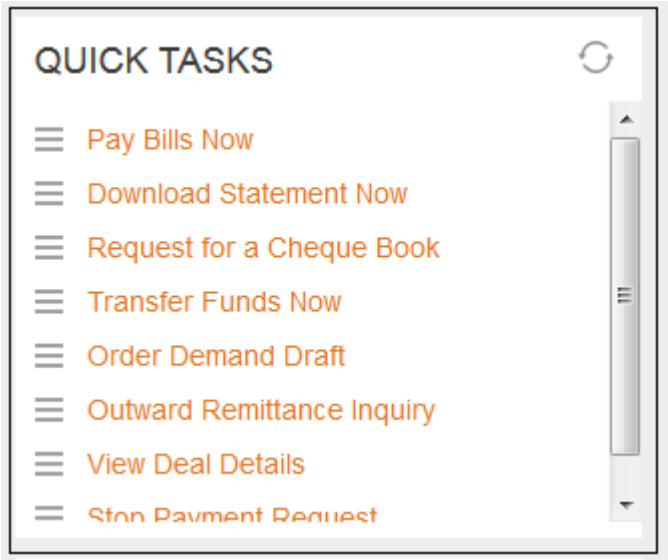


Note: For more information about **Reminders**, see *Customer Services User Manual*.

14. Quick Tasks

This widget allows the user to easily access the given transactions without having to navigate through the menu. Transactions to be displayed as Quick Tasks will be predefined. Only those transactions will be displayed in the user's widget for which the user has access.

Widget – Quick Tasks



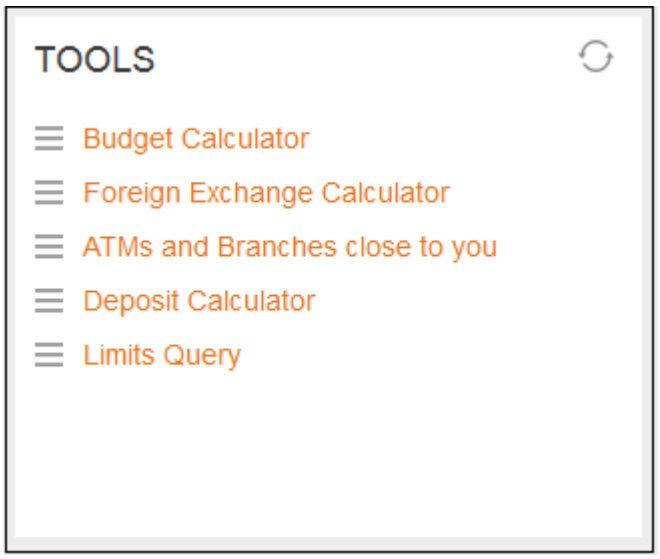
To quick access the frequently used transactions

1. Click any of the transaction links.
   The transaction in a new screen appears.
2. Click to refresh the data in the widget.

15. Tools

This widget allows the user to easily access the tools available in the application without having to navigate through the menu. Transactions to be displayed as Tools will be predefined as per the user type combination. Only those transactions will be displayed in the user's widget for which the user has transaction access.

Widget – Tools



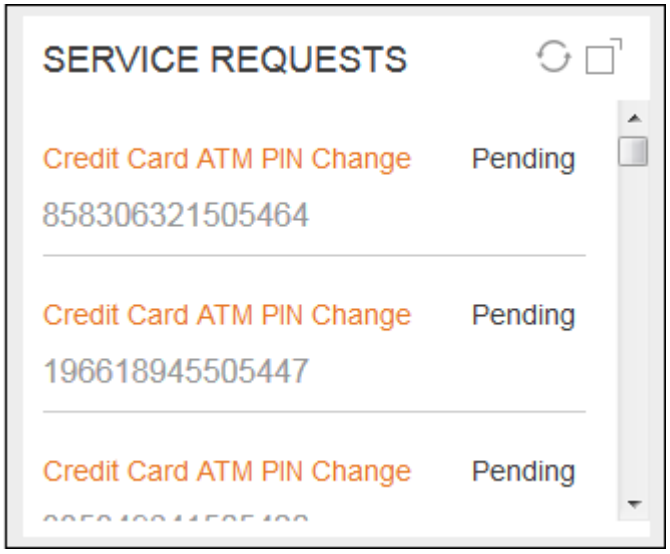
To access tools

1. Click any of the transaction links.
   The transaction in a new screen appears.
2. Click in the widget to refresh.

16. Request Status

This widget will display, in the case of Retail Users, latest status of service requests initiated by the user. In the case of Corporate Users, this widget will display status updates of all service requests initiated by users belonging to the customer ID, to which the user has view access as per mandates set. Hence, status updates of service requests as available in the, 'View Transactions' screen of User Authorisations dashboard will be displayed in the Corporate User's dashboard.

Widget – Request Status



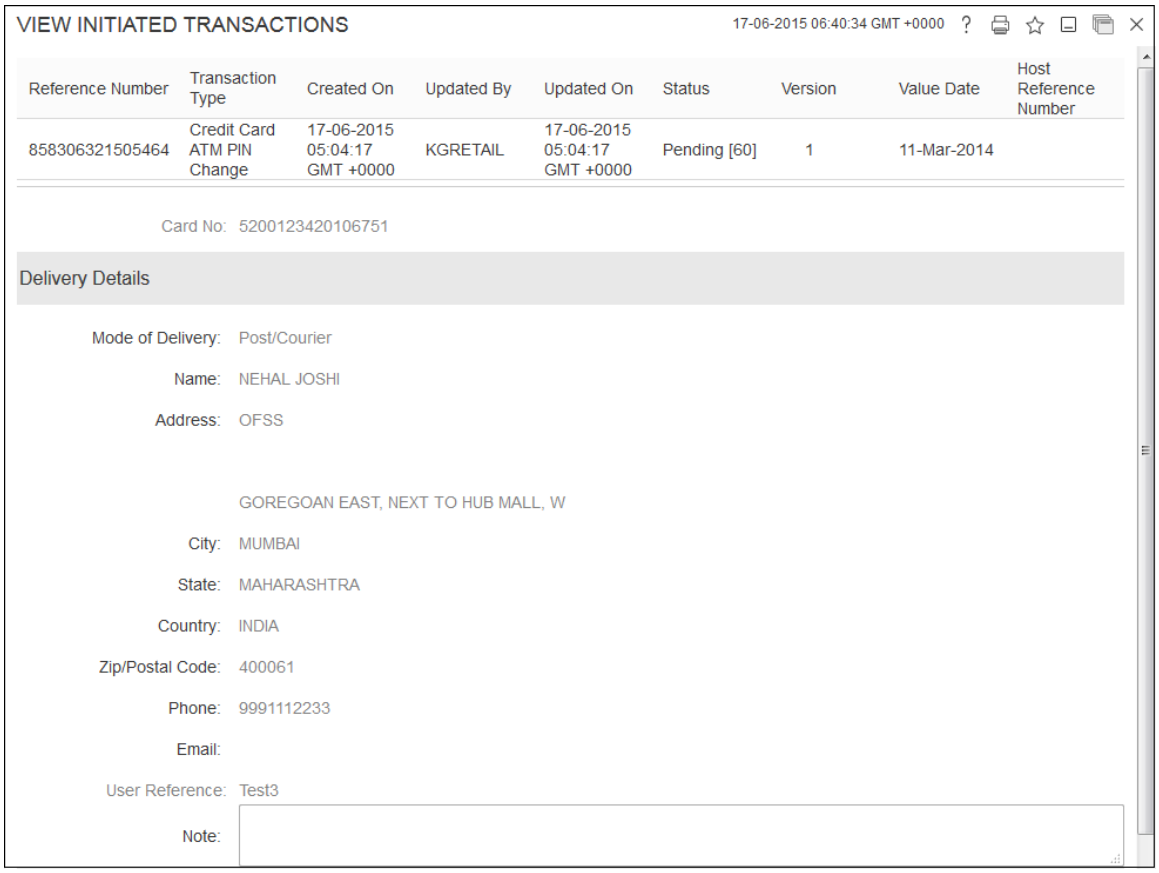
Field Description

Field Name	Description
Reference No	[Display] Displays the ID of the request generated by the system at the time of request initiation.
Service Requested	[Display] Displays the type of request.
Status	[Display] Displays the current status of the service request.

To view the status of service requests

1. Click on any service request link.
The **View Initiated Transactions** screen appears.

View Initiated Transactions



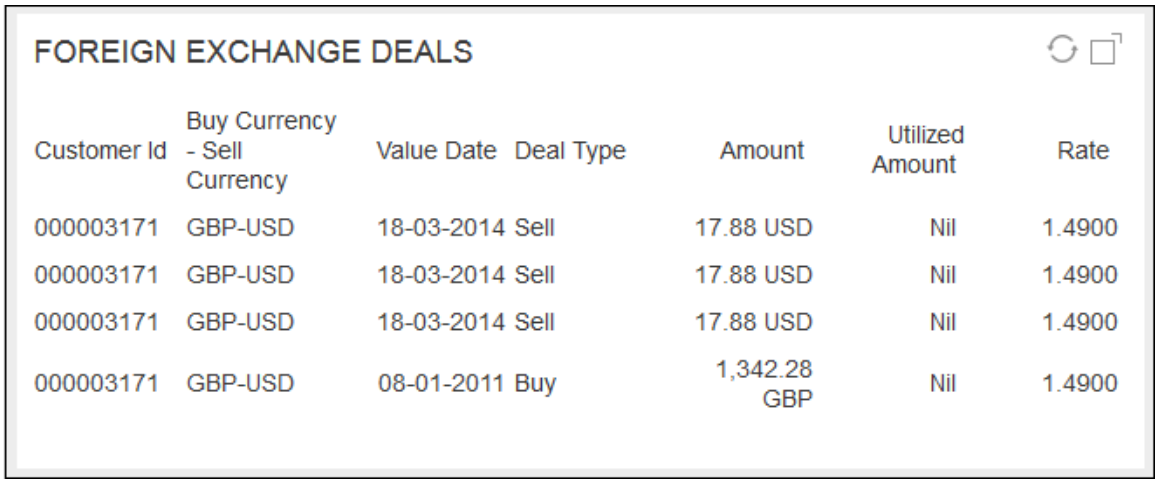
2. Click icon to refresh the data in the widget.

3. Click icon in the widget.
The **View Initiated Transactions** screen appears.

17. Foreign Exchange Deals

This widget will display minimal details of all the foreign exchange deals available to the user. The deals will be grouped by the value date and will be in chronological order.

Widget – Foreign Exchange Deals


FOREIGN EXCHANGE DEALS
Customer Id
Buy Currency - Sell Currency
Value Date
Deal Type
Amount
Utilized Amount
Rate
000003171 GBP-USD 18-03-2014 Sell 17.88 USD Nil 1.4900
000003171 GBP-USD 18-03-2014 Sell 17.88 USD Nil 1.4900
000003171 GBP-USD 18-03-2014 Sell 17.88 USD Nil 1.4900
000003171 GBP-USD 08-01-2011 Buy 1,342.28 GBP Nil 1.4900

Field Description

Field Name	Description
Customer ID	[Display] Displays the customer ID for which the deal is booked.
Buy Currency – Sell Currency	[Display] Displays the currency pair of the deal.
Value Date	[Display] Displays the value date of the deal.
Deal Type	[Display] Displays the type of deal - buy or sell.
Amount	[Display] Displays the amount of the deal.
Utilized Amount	[Display] Displays the amount of the deal that has been utilized along with the currency.
Rate	[Display] Displays the rate at which the deal was made.

To view the foreign exchange deals

1. Click to refresh the data in the widget.

2. Click in the widget.
The **View Deal Details** screen appears.

View Deal Details